

# Envision Wellness WNY

Annual Report 2024



# Mission Statement

Envision Wellness WNY Behavioral Health is dedicated to fostering growth, self-efficacy, and independence by providing innovative, evidence-based treatment focused on a whole-person recovery model. Guided by each participant's personal experiences and needs, we aim to enhance stability, acceptance, and quality of life while promoting inclusion and active community membership.

We believe compassionate treatment instills hope, restores dignity, and rebuilds lives, enriching the community we all share.

Let's Envision your wellness together.

# Projects and Initiatives

- Completed the transition to the new **Electronic Medical Record (EMR)** system (Accumedic) and billing platform (Millin), enabling improved reporting and client access through a portal.
- Continued the **Patrick Lee Foundation Fellowship Program**, hosting clinical master's-level interns with stipends. The program included robust evidence-based training and rotations across all treatment programs.

# Financial Statement

- **Revenue:** \$2,532,468.07
- **Expenses:** \$2,692,992.17
- **End-of-Year Bonus:** Provided to all staff.

# Services Provided

- Intakes: 267
- Sessions Provided: 10,334
- Tele-sessions: 411
- Assessments Provided: 952
- Total Active Caseload: 632
- Total Clients Served: 1,297 (active and discharged)

# Client Satisfaction Survey data

42% response rate

- I feel welcomed and comfortable at the clinic: 85% positive response rate always or most of the time
- I feel I am involved in my care and included in the decision making regarding my treatment; 80% positive response rate always or most of the time
- I feel the staff encourages me to develop my mental health and/or substance use recovery goals; 72% positive response rate always or most of the time
- I feel the staff encourages and welcomes the input and support of my family; 72% positive response rate always or most of the time
- I feel the staff has an understanding of my mental health care needs and successfully coordinates care with my other providers; 83% positive response rate always or most of the time



# Performance Measures

- Hospitalizations: 9 of 639 clients (1%)
- Attendance Rate: 30.25%
- Untoward Events: 8
- Crisis Services Calls: 0
- CARES Calls: 5 (none required in-person response)

## Technology

Full transition to new Electronic Medical Record (EMR) (Accumedic) and billing platform (Millin) which includes a Portal and more robust data driven reports

# Staffing

- Retention: 17 hires, 17 resignations (47% turnover rate)
- Fully Staffed: 36 employees
- Staff Satisfaction Survey (76% response rate):
  - 94% feel valued by the agency.
  - 83% satisfied with the working culture.
  - 71% would recommend Envision to family or friends for services.
  - 88% feel Envision values and promotes diversity.
  - 60% find purpose and meaning in their work.
- Interns Hosted: 1 BSW, 13 graduate-level (10 completed the Fellowship Program). Mental Health Counseling /Social work/ Art Therapy

# Marketing and Outreach

- Campaigns: WIVB and WECK radio.
- Events Attended: 8
- Community Presentations: 5

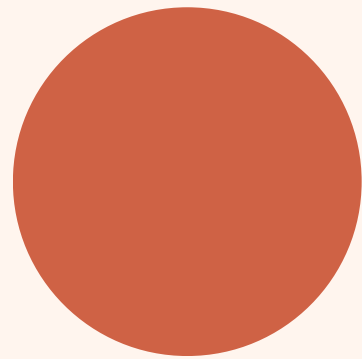
# Training

- Internal Training: 215 hours.
- CPI Training: 15 staff received Integrated Mental Health/Addictions Treatment (IMHATT) certification.
- NARCAN Trained: 15 staff.
- DBT Trained: 13 staff.
- Motivational Interviewing Trained: 14 staff.
- PROS Specialized Training: 300+ hours, including:
  - PROS Redesign Training.
  - Individual Placement Support (IPS) Employment Services.
  - Psychiatric Rehabilitation Practitioner (CPRP) Certification (3 staff certified).
- Off-Site Training: 505 hours, including evidence-based treatment protocols:
  - MAPP: 4 staff trained.
  - EMDR: 5 staff trained.
  - Play Therapy: 7 staff trained.
  - WPATH Certification: 1 staff member certified.
  - Licensed professionals completed 12+ CEUs to maintain NYS licensure.

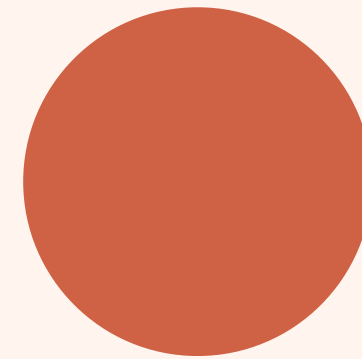




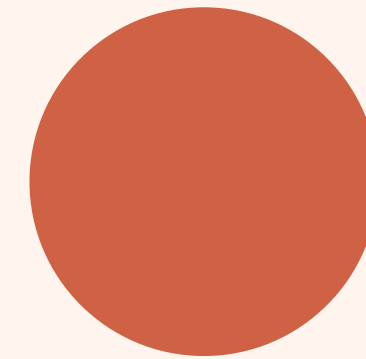
# 2024 Highlights



Transitioned to Accumedic EMR and Millin billing platform for enhanced functionality.



Expanded staff training in evidence-based protocols to enhance clinical skills.



Supported community outreach through marketing campaigns and events.

# Message from our CEO, Tara Pace, MS, LMHC

Change is the only constant, and with change comes both challenge and opportunity. At Envision Wellness WNY, our trajectory of sustained growth has demanded tenacity and bravery from our dedicated staff. Time and again, our team has embraced systemic and process shifts, building a culture of resilience and commitment.

Our ability to provide exceptional services to our clients depends on the dedication of our staff to our mission. This year, we continued investing in their growth through support and evidence-based training, while also hosting student interns with the help of the Patrick Lee Foundation. We value ongoing education and collaborative learning, recognizing its impact not only on the individuals we serve but also on our broader community.

A significant milestone this year was transitioning to a more robust, data-driven electronic medical record (EMR) system. This transformation has equipped us to better assess our internal needs, remain competitive, and provide meaningful, data-informed care. While the process was disruptive and occasionally frustrating, it was also exciting. Thanks to the perseverance of our team, we are now seeing the benefits—greater stability, growth, and long-term sustainability.

Envision Wellness remains focused on delivering competent, mission-driven care to everyone who seeks our services. We are committed to expanding our reach, strengthening our brand, and continuing to provide quality treatment to those in need.

To our supporters: thank you. Your encouragement fuels our journey, and we see and appreciate you.



# Goals for 2025

- Increase revenue by 10%.
- Expand caseloads by 10%.
- Reduce no-show rates by 10%.
- Maintain staff with a reduced turnover rate of 30%.
- Expand programming by participating in the Western New York Integrated Care Collective (WNYICC) 115 Waiver program.
- Develop training manuals for each program.
- Enhance leadership capacity and skills.
- Broaden marketing and advertising efforts.

# Get in touch

*For questions, comments and suggestions*

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